



APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF ARCHIVES AND HISTORY
RECORDS MANAGEMENT DIVISION

INSTRUCTIONS: See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address Department of Education Office of Administrative Services Fiscal Services Division Accounting Services Section Atlanta, GA 30334	Application Number 79-215-A	
Application Number		Date Received JUL 22 1981	Date Completed AUG 7 1981
2. Person to Contact Arvil Ensley		Working Title Administrator	Telephone Number 656-2497
3. Action Requested a. <input type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input checked="" type="checkbox"/> Amend Application No. <u>79-215</u> Check One: <input checked="" type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest <u>1959</u> Latest <u>To Date</u>		5. Records Series Title (followed by title used in office, if different) <u>Education Grants Accounting Files</u>	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? <u>No Change.</u>			
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: <u>administering the payment of state and federal grants to local school systems, regional libraries, other state agencies and individuals.</u> Included are: <u>No Change</u> File is arranged: <u>No Change</u>			
8. Monthly Reference Rate How often are records referred to which are: One to six months old _____; Seven to twelve months old _____; Thirteen to twenty-four months old _____; twenty-five months and older _____?			
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) _____			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
		a. Is this the official copy of the series? If not, where is it?
		b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
		c. Is this a vital record?
		d. Does this series have historical or long term research value?
		e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
		f. Is the information contained in this series ever published? If yes, attach copy.
		g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
		i. Is this series (or a major portion of it) regularly microfilmed?
		j. Does the record series result in a computer printout?

11. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|--------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | _____ years. |
| c. Federal law | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

NO CHANGE

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☒ Hold in the current files area _____ month(s) _____ year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☒ Transfer to State Records Center; hold _____ year(s); then
- ☒ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>A. Hegman Culp</i>	7/20/81	Walker L. Baumgardner	7-13-81
		State Records Committee (Signature)	Date
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Auditor/Designee	7-27-81
		Secretary of State/Designee	7-27-81
		Attorney General/Designee	8-2-81



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FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date 10-24-79	1. Agency Address Department of Education Fiscal Services Division Accounting Services Unit 132 State Office Building Atlanta, Georgia 30334	Application Number 79-215	Date Received OCT 31 1979
Application Number		Date Completed NOV 16 1979	
2. Person to Contact Arvil Ensley		Working Title Director	Telephone Number 656-2497
3. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest 1959 Latest Present		5. Records Series Title (followed by title used in office, if different) Grant Vocational Education/Accounting Files	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? Accounting Services Unit provides the necessary accounting services to all organizational levels of the State Department of Education for all monies received and disbursed on behalf of education in Georgia.			
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: Paying vocational grants to school systems. Included are: Teacher contracts, expenditure reports, payroll reports, project and grant documents, requisitions and other related computer printouts and correspondence. File is arranged: Teacher contracts, project and grant documents, and requisitions are numerically by system number. Expenditure reports and payroll reports are chronologically by month. How often are records referred to which are:			
8. Monthly Reference Rate One to six months old 25; Seven to twelve months old 25; Thirteen to twenty-four months old 5; twenty-five months and older 2 times a year.			
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) 15 boxes			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
X		c. Is this a vital record?
	X	d. Does this series have historical or long term research value?
N/A		e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	X	h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
	X	i. Is this series (or a major portion of it) regularly microfilmed?
	X	j. Does the record series result in a computer printout? Part of it is computer printout.

11. Retention Requirements

The following requires the series to be kept:

a. State Law	_____ years.	d. Audit period	2 _____ years.
b. Statute of limitation	_____ years.	e. Administrative need	8 _____ years.
c. Federal law	5 _____ years.	f. Federal retention instructions	_____ years.

Attach copy or excerpt of laws or regulations. Explain administrative need. P.L. 93-380 and 45 CFR 100a.734.
Some of these grants run for three (3) years. Three (3) years plus the federal requirement of five (5) years gives a total retention requirement of eight (8) years.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☒ Hold in the current files area _____ month(s) _____ 2 _____ year(s); then
☐ Transfer to local holding area; hold _____ year(s); then
☒ Transfer to State Records Center; hold _____ 6 _____ year(s); then
☒ Destroy.
☐ Transfer to State Archives for permanent retention.
☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)

Date

Records Management Officer (Signature)

Date

Recommendations in paragraph 12 are approved.
(If disapproved, attach letter of explanation.)

State Auditor/Designee

State Records Committee (Signature)

Date

Secretary of State/Designee

Attorney General/Designee

(Reverse Side)